

STATE TAX COMMISSION
STRATEGIC PLAN FY 2007-2010

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Introduction

The Tax Commission's strategic planning process began in 1994; the first planning document was issued a year later. The agency's strategic plan has since been modified to create a better guide for Tax Commission employees as well as a more user-friendly document for the public.

This strategic plan represents the goals and strategies of the Tax Commission for fiscal years 2007-2010. The entire Tax Commission staff will use this planning document as a tool to focus on our common goals and how we will reach them.

Also, we will conduct an annual performance review to measure progress toward our goals. This review will be summarized in our Annual Report.

Values

Values are the principles of conduct that guide our interactions with coworkers, stakeholders and customers. Values clarify what's important in our organization and serve as a baseline for decision making every day. The Tax Commission embraces the following organizational values:

Accomplishment:

Complete your work in a way that meets or exceeds expectations.

Credibility:

Inspire others to have confidence in you and the agency by being trustworthy and professional.

Dependability:

Be reliable and accept responsibility in such a way that others will count on you.

Enjoyment:

Find daily opportunities to connect with people, have fun and share a positive attitude.

Fairness:

Be impartial and apply consistent standards in all situations.

Integrity:

Be forthright, honest and ethical in your personal and professional dealings with others.

Quality:

Do the very best you can and continually seek opportunities to improve.

Respect:

Treat others with dignity and show consideration for their diversity, actions, and ideas.

Teamwork:

Step up to do your part, communicate openly with others and work toward common goals.

Mission

To provide courteous, quality services and to administer the state's tax laws in a fair, timely, and cost-effective manner to benefit Idaho citizens.

Vision

The Tax Commission will inspire public confidence through innovative service delivery, courteous professional conduct, and fairness in tax administration.

To make this vision a reality, we will:

1. Promote Voluntary Compliance

- Each employee contributes to voluntary compliance in their daily contact with taxpayers by being responsive, courteous and respectful.
- Employees should identify problematic rules and laws and communicate them to management so our executive and legislative branches can consider changes.
- Sharing our technical knowledge with each other and the taxpayers we come into contact with will bring taxpayers into the system.

2. Make it easy for the public to understand Idaho taxes

- Employees are expected to make suggestions to ensure all tax returns, instructions, publications and web-based information are as simple and clear as possible.
- Employees should identify problem areas that will allow the Commission to focus training and outreach in the most critical areas.

3. Make the best use of Tax Commission Resources

- Each work unit should periodically review and evaluate its operations to avoid duplication, wasted time and effort.
- Employees are encouraged to:
 - Consider how their actions impact others in the agency;
 - Communicate changes;
 - Be flexible and adaptable in the workplace; and
 - Use technology wisely; be sure the process is best served by automation.
- Employees have a responsibility to seek growth opportunities, to foster teamwork, to share their acquired skills and ideas, and to treat one another with respect.

4. Make our tax administration equitable

- If taxpayers fail to comply, employees will work with them to bring them into compliance.
- Employees will interpret and apply tax laws and rules consistently.
- Employees will pursue issues and produce timely, accurate results.
- Employees will treat all taxpayers in an impartial and fair manner.

Key External Factors

- Population growth and Idaho's changing economy.
- The pace and cost of technological change.
- Increasing complexity of administrative procedures resulting from the mandates of other agencies, court decisions or legislation.
- Changes in federal tax legislation that would have extensive effects on state tax statutes.
- The "New Economy" – more global than local – challenges our traditional tax structure.
- Increasing technology-based criminal activity, which challenges our ability to protect confidential information.

Strategic Plan

Goal Number One

- 1. Make conducting business as simple as possible for our customers, stakeholders, and employees**

Objectives

- 1.1. Improve opportunities to file on time, pay on time, and receive prompt refunds**
- 1.2. Leverage E commerce and other technologies**
- 1.3. Simplify the production and offering of forms, publications, and procedures**
- 1.4. Continue to develop and expand customer feedback**
- 1.5. Seek and implement efficiencies, improvements and innovations in agency programs and services**
- 1.6. Keep the IT infrastructure current**

Goal Number Two

- 2. Recruit, develop, retain, and value a high quality, workforce**

Objectives

- 2.1. Provide a work environment conducive to employee satisfaction**
- 2.2. Institute a workforce plan**
- 2.3. Define roles, responsibility, and authority of various committees and work teams**

Goal Number Three

- 3. Build and strengthen relationships with our customers and stakeholders**

Objectives

- 3.1. Continue and expand outreach and education efforts**
- 3.2. Maintain, expand, and improve vendor partnerships**

Goal Number Four

- 4. Promote fairness, consistency, and uniformity in the development and administration of tax law and policy**

Objectives

- 4.1. Provide timely, appropriate, and accurate information and advice to taxpayers**
- 4.2. Improve the rules process**
- 4.3. Participate in uniformity efforts at the state and national levels**
- 4.4. Develop processes to ensure quality**

Goal Number Five

- 5. Exercise security and maintain confidentiality of information**

Objectives

- 5.1. Provide a secure Agency for employees and taxpayers**
- 5.2. Develop, implement, and maintain a business continuity plan**
- 5.3. Emphasize appropriate privacy while recognizing public information requirements**
- 5.4. Improve documentation and procedures**
- 5.5. Develop, implement, and maintain an information life-cycle management plan.**

Performance Measures

Performance Measurement 1: Percentage of income tax refunds not processed

Within 60 day limit.

Benchmark: Current year individual income tax returns requesting refunds must be processed within 60 days of Commission receipt or interest will apply by Idaho Statute. Target is less than 1.0% for income tax returns not processed within this time frame.

Explanation: Current year individual income tax returns requesting refunds received through our state electronic filing program will be paid within 15 days of our acknowledgement of receipt. The 60 day refund time is statutory and the 15 days is an industry standard accepted by the IRS and other e-file states.

Indicator for: Goal 1; Make conducting business as simple as possible for our customers, stakeholders, and employees

Performance Measurement 2: Percentage of E-filed individual income tax returns

Benchmark: Percentage of individual tax returns filed electronically in relation to total tax returns received. Target is 55%

Indicator for: Goal 1; Make conducting business as simple as possible for our customers, stakeholders, and employees

Performance Measurement 3: Percentage of E-payments

Benchmark: Attain 50% of receipts received electronically in relation to total tax returns received.

Indicator for: Goal 1; Make conducting business as simple as possible for our customers, stakeholders, and employees

Performance Measurement 4: Number of E-mail Web subscriptions to the Tax Commission Web Site.

Benchmark: Number of subscriptions for automatic updates from the Tax Commission Web Site. Target for FY 2007 is 1,500.

Indicator for: Goal 1 (specifically 1.3); Continue to develop and expand customer feedback. Also Goal 3: Build and strengthen relationships with our customers and stakeholders.

Performance Measurement 5: Average cost of collection bureau per collection case closed.

Benchmark: Measures the average cost within the Tax Commission of the collection bureau for the current year, expressed in terms of collection cases resolved during that year. Target for FY 2007 is \$37.13 per case.

Indicator for: Goal 1 (specifically Goal 1.5): seek and implement efficiencies, improvements and innovations in agency programs and services.

Performance Measurement 6: Average cost of audit bureau per audit case closed.

Benchmark: Measures the average cost within the Tax Commission of the audit bureau for the current year, expressed in terms of audit cases concluded during that year. Target

for FY 2007 is \$480 per case.

Indicator for: Goal 1 (specifically Goal 1.5): seek and implement efficiencies, improvements and innovations in agency programs and services.

Performance Measurement 7: Call center queue time

Benchmark: The average length of time before a phone call is connected to a live body. Target is between 15-20 seconds.

Indicator for: Goal 1 (specifically Goal 1.5 and Goal 1.6): Keep the IT infrastructure current.